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ABSTRACT

The goal of the doctoral dissertation summarized here was to develop a set of recommended guidelines to be used in developing standards and procedures for elementary and secondary public school facility construction in Arizona. The study focuses on determining the essential elements of these guidelines and on determining which of these elements are most likely to be subject to state jurisdiction, local jurisdiction after receiving state guidance, and local jurisdiction without state guidance or regulatory control. The research data and generalizations were organized into ten guidelines that were divided into two main categories of responsibility. The first category is that in which the state department of education should make recommendations that are then subject to local decision-making. This area includes school plan needs, standards and educational policy, educational specifications, finance, and building design. The second area is that in which decision-making ought to be entirely up to local districts. It includes public relations, architectural services, site selection and acquisition, construction services, and accepting and occupying buildings. (Author/IRT)

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GUIDELINES FOR DEVELOPMENT OF STANDARDS FOR PUBLIC SCHOOL FACILITIES IN THE STATE OF ARIZONA

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FOREWORD

This study is the fifth issue of Research Reports on Educational Administration in this its sixth volume year, 1975-76. First published in 1971, R.R.E.A. has brought current and concise research to the desks of Arizona school administrators. The current issue is the twenty-eighth in the continuing series.

Each year, topics which may be of greatest current interest to administrators in Arizona are identified from among the doctoral dissertations produced by the Department of Educational Administration and Supervision at Arizona State University. These topics are then summarized and appear in Research Reports on Educational Administration. The issues are distributed to administrators throughout the State of Arizona.

A list of titles in this series which are available from the Bureau of Educational Research and Services is included on the inside back cover. They are also available in microform from Xerox University Microfilm, 300 North Zeeb Road, Ann Arbor, Michigan, 48106.

H. Ray Shipley surveyed several state departments of education and experts in school facility planning and construction. From this research he developed ten guidelines for a state program of standards for public school facilities in the State of Arizona.

These guidelines and the supporting rationale and descriptions form the basis for recommending to the Arizona State Department of Education and the Arizona State Legislature standards and procedures for a state school facilities planning and construction program.

R.M.D.
H.A.S.

GUIDELINES FOR DEVELOPMENT OF STANDARDS FOR PUBLIC SCHOOL FACILITIES IN THE STATE OF ARIZONA

INTRODUCTION

Virtually the total burden of school facilities construction costs in the State of Arizona rests with the local taxpayer. When the total burden of all taxes including local and state government becomes irritating or oppressive, the taxpayers react in one of the few realms available to them. They frequently defeat bond elections which are designed to finance needed school facilities. This reaction by disgruntled taxpayers, in combination with inadequacies in statutory provisions for school construction finance, restricts the availability of funds to the point that it seriously affects public school facility construction.

Lack of adequate procedures and guidelines for school facility construction have also adversely affected much of the planning and construction of school buildings in the State of Arizona. Most Arizona school districts cannot maintain a staff of sufficient size and competency for needed analysis and supervision of construction and have little in the way of reliable advice and assistance from other sources on which to rely. As a result of this lack of adequate guidelines and assistance, many school buildings are quite costly or perhaps do not measure up to proper educational and maintenance standards.

The researcher contended that the Arizona State Legislature should, therefore, assume responsibility for ensuring that minimal guidelines and standards for design and construction of school facilities are established and applied under an appropriate state regulatory agency.

THE PROBLEM

The purpose of this study was to develop a set of recommended guidelines to be used in developing standards and procedures for elementary and secondary public school facility construction in the State of Arizona. The study focused on determining the essential elements of these guidelines and

which of these elements were most likely to be subject to (1) state jurisdiction, (2) local jurisdiction after receiving state guidance, or (3) local jurisdiction without state guidance or regulatory control.

PROCEDURES

The three major phases of the study were:

1. A review of the literature pertaining to planning and construction of school facilities. From this review the program elements that were found to be essential to school facility construction guidelines were organized into screening and survey instruments.

2. The practices described in public school facilities programs from twenty-five states were screened as to their relationships to the essential elements of the model developed in the first phases of the study.

3. Fifteen Arizona school superintendents, 22 Arizona legislators comprising the education committee of both the Arizona House of Representatives and the Arizona Senate, and 10 national experts in the field of facilities planning that were recommended by the Council of Educational Facility Planners International were surveyed utilizing the screening instrument developed in the first phase of the study. The responses from these groups were used to draw the conclusions as listed.

From these sources of information, a proposed set of guidelines for the development of standards and procedures for public school facilities for the State of Arizona was organized.

FINDINGS

It was determined that distinct areas of responsibility in decision making were evident in Arizona and that guidelines for school planning and construction programs could be developed. Such guidelines, however, should allow for changing processes, the rapidly developing technology and changes in educational methodology.

The research data and generalizations were organized into ten guidelines. These ten guidelines were developed around the ten elements of the research instrument and divided into two main categories of responsibility.

I. State Department of Education (Recommendations only-local districts to maintain decision-making jurisdiction)

1. School Plant Needs

1.1 Pupil population
1.2 Facilities projections

2. Standards and Educational Policy

2.1 School size
2.2 Curriculum space needs

3. Educational Specifications

3.1 Educational program
3.2 Space relationships

4. Finance Program

4.1 Expenditure program
4.2 Revenue program

5. Building Design

5.1 Environmental factors
5.2 Safety
5.3 Space guidelines
5.4 Plan approvals

II. Local school district

6. Public Relations

6.1 Community philosophy
6.2 Project orientation

7. Architectural Services

7.1 Selection of architect
7.2 Architectural functions

8. Site Selection and Acquisition

8.1 Location
8.2 Features (topography, soil, etc.)
8.3 Acquisition

9. Construction Services

9.1 Awarding bids
9.2 Supervision of Construction

10. Accepting and Occupying Building

10.1 Final inspection
10.2 Acceptance
10.3 Equipping
10.4 Re-assessment

The ten guidelines and their subdivisions were not recommended to be placed under total state jurisdiction. All elements of the guidelines were recommended to be placed under either state guidance, leaving the local school district, or under total local school district control.

Rationale and descriptions of some of the major considerations in using the guidelines as a basis in preparing and developing standards and operational procedures for a recommended Arizona state school facilities planning and construction program were given.

CONCLUSIONS

The following four conclusions were determined to be pertinent to the study:

1. Instructional and guidance services provided by a central agency are vital to all school districts. This central agency should take responsibility for research and organization of the best known principles of design and construction in the changing field of instructional methodology.

2. Inasmuch as the local school boards have been delegated the responsibility for construction of educational facilities and since this research supports this delegation of responsibility, the State of Arizona should provide leadership to local school districts in providing educational facilities in the same manner they provide leadership in other areas of the educational function.

3. An information system based on systems analysis and management by objectives should be developed by the Arizona State Department of Education in coordination with the Legislature, the State Superintendent of Public Instruction, the State School Board, local districts, and school clients.

4. Through coordination and cooperation, strengths can be built into school facilities programs in Arizona which will assure cost effectiveness and will bring about educational environments which will respond to educational objectives now and in the future.

RECOMMENDATIONS

The following recommendations were made:

1. The Arizona State Board of Education should create a Division of School Facilities within the State Department of Education. This enactment should provide budgetary funds sufficient to employ a staff to counsel all school districts in the state which contemplates and implements school construction programs.

2. The Division of School Facilities should utilize the ten guidelines developed within this study and should prepare a State program of standards and operational procedures based upon the practices and experiences of other school districts throughout the nation. These standards and procedures would be used in guidance of local school districts.

3. The Division of School Facilities should prepare manuals of recommended procedures within areas of program responsibility which this study suggested be left to the jurisdiction of the local school districts (Public Relations, Architectural Services, Site Selection and Acquisition, Construction Services, and Accepting and Occupying Buildings.)

4. The Division of School Facilities should prepare comprehensive programs of recommended standards, operational procedures, and alternative interpretations to guide all local school districts in design of local construction programs in the area of recommended State guidance. (School Plant Needs, Standards and Educational Policy, Educational Specifications, Finance Program, and Building Design.)

5. The Division of School Facilities should organize a program of communications and consultation with all local school districts of the State in order to establish an awareness of contemplated and existing construction programs and the advice of this study.

IMPLICATIONS

The school districts in the State of Arizona can cooperate and coordinate their efforts with the State Department of Education.

Through the guidelines recommended in this study and through the mutual efforts and interests of local school boards and the State Department of Education in providing suitable and functional physical facilities and surroundings for Arizona's public schools.

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